Introduction

For Open Scope SOWs, prior to submitting fees for daily work, Suppliers need to create workers for labour and equipment and then assign them to the appropriate SOW. There are 4 ways to add workers to an SOW. The method you choose will depend on the status of the worker or equipment you want to bill for.

In Fieldglass, both individual workers and pieces of equipment need to be added as "SOW Workers" for each role they will preform in order to drive the proper rate when submitting fees for these workers. Therefore, this step is required before submitting fees.
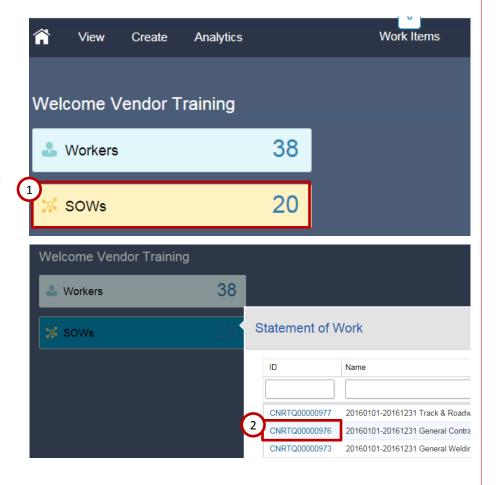
This job aid covers:

I.   Locating the Appropriate SOW

II.   Reviewing Roles for SOW Workers with Fees

III.   Adding a New SOW Worker

IV.   Submitting an Existing SOW Worker

V.   Adding an Active SOW Worker

VI.   Uploading SOW Workers

VII.   Verifying SOW Workers Were Added

I.   Locating the Appropriate SOW

The SOWs button, located on the left-hand side of the Home page, provides access to all SOWs associated with a specific user.

To access an SOW from the Home Page, complete the following steps:

1. **SOWs:** Click the SOWs button. A list of available SOWs will be displayed in a popup box.

2. **SOW ID:** Click the ID link of the SOW to view its details.

II. Reviewing Roles for SOW Workers with Fees

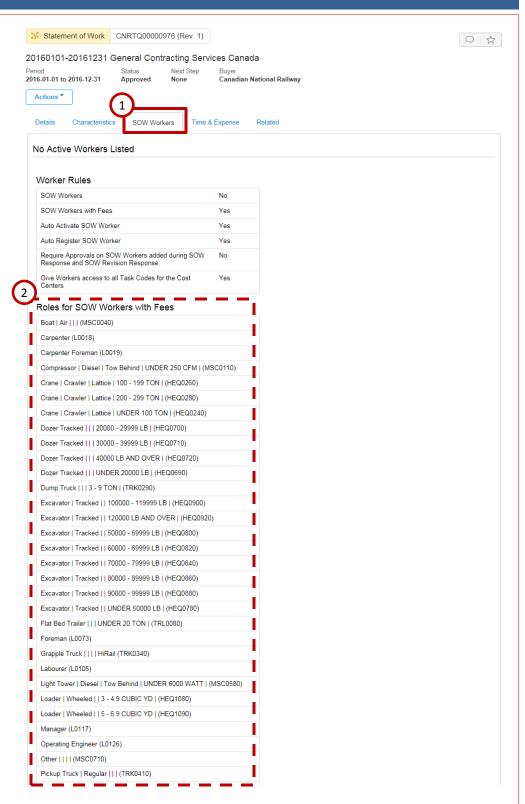Before adding a worker (labour or equipment) to an SOW, you must review the Roles for SOW Workers that were created for this specific contract.

1. **SOW Workers:** In the SOW, click the SOW Workers tab to display the details about the worker roles assigned to the contract.

2. **Roles for SOW Workers with Fees:** Provides a complete list of available roles for workers and equipment for a specific contract (SOW).

⚠️ You will only be able to create workers/equipment on this SOW for roles listed in the SOW Workers tab.

If a role is missing, contact the SOW Owner.

🔆 Statement of Work   CNRTQ00000976 (Rev. 1)

20160101-20161231 General Contracting Services Canada

Period	Status	Next Step	Buyer
2016-01-01 to 2016-12-31	Approved	None	Canadian National Railway

Actions ▼

① Details   Characteristics   **SOW Workers**   Time & Expense   Related

No Active Workers Listed

Worker Rules

SOW Workers	No
SOW Workers with Fees	Yes
Auto Activate SOW Worker	Yes
Auto Register SOW Worker	Yes
Require Approvals on SOW Workers added during SOW Response and SOW Revision Response.	No
Give Workers access to all Task Codes for the Cost Centers	Yes

② **Roles for SOW Workers with Fees**

- Boat | Air | | | (MSC0040)
- Carpenter (L0018)
- Carpenter Foreman (L0019)
- Compressor | Diesel | Tow Behind | UNDER 250 CFM | (MSC0110)
- Crane | Crawler | Lattice | 100 - 199 TON | (HEQ0260)
- Crane | Crawler | Lattice | 200 - 299 TON | (HEQ0280)
- Crane | Crawler | Lattice | UNDER 100 TON | (HEQ0240)
- Dozer Tracked | | | 20000 - 29999 LB | (HEQ0700)
- Dozer Tracked | | | 30000 - 39999 LB | (HEQ0710)
- Dozer Tracked | | | 40000 LB AND OVER | (HEQ0720)
- Dozer Tracked | | | UNDER 20000 LB | (HEQ0690)
- Dump Truck | | | 3 - 9 TON | (TRK0290)
- Excavator | Tracked | | 100000 - 119999 LB | (HEQ0900)
- Excavator | Tracked | | 120000 LB AND OVER | (HEQ0920)
- Excavator | Tracked | | 50000 - 59999 LB | (HEQ0800)
- Excavator | Tracked | | 60000 - 69999 LB | (HEQ0820)
- Excavator | Tracked | | 70000 - 79999 LB | (HEQ0840)
- Excavator | Tracked | | 80000 - 89999 LB | (HEQ0860)
- Excavator | Tracked | | 90000 - 99999 LB | (HEQ0880)
- Excavator | Tracked | | UNDER 50000 LB | (HEQ0780)
- Flat Bed Trailer | | | UNDER 20 TON | (TRL0080)
- Foreman (L0073)
- Grapple Truck | | | | HiRail (TRK0340)
- Labourer (L0105)
- Light Tower | Diesel | Tow Behind | UNDER 6000 WATT | (MSC0580)
- Loader | Wheeled | | 3 - 4.9 CUBIC YD | (HEQ1080)
- Loader | Wheeled | | 5 - 6.9 CUBIC YD | (HEQ1090)
- Manager (L0117)
- Operating Engineer (L0126)
- Other | | | | (MSC0710)
- Pickup Truck | Regular | | | (TRK0410)

III. Adding a New SOW Worker

This section details how to add a new worker (labour/equipment) to Fieldglass for an SOW. Here, "new" means that this worker has never been created in Fieldglass before.
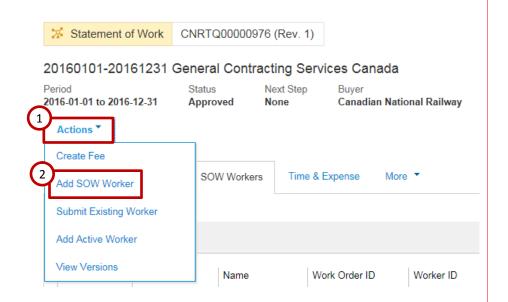
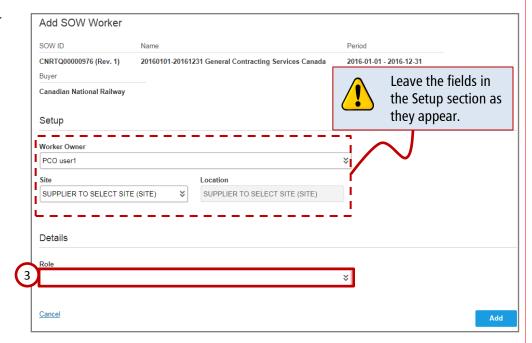To manually add a Worker to an SOW, complete the following steps:

1. **Actions:** Click the Actions button to access the dropdown list.

2. **Add SOW Worker:** Click Add SOW Worker to display the worker creation form and manually enter the information.

3. **Role:** In the Details section, select a Role from the dropdown list for the worker you are about to create.

Here, you can select a Role for labour or a piece of equipment.

⚠️ If a person will perform more than one role on a contract, they will need to be added t the SOW for each role. For example, John will be acting as both a Foreman and a Carpenter for an SOW. Therefore, he will have to be added as a Foreman and then again as a Carpenter.

![Statement of Work screen showing SOW CNRTQ00000976 (Rev. 1), 20160101-20161231 General Contracting Services Canada, Period 2016-01-01 to 2016-12-31, Status Approved, Next Step None, Buyer Canadian National Railway. Actions dropdown (1) open showing: Create Fee, Add SOW Worker (2), Submit Existing Worker, Add Active Worker, View Versions. Tabs: SOW Workers, Time & Expense, More. Columns: Name, Work Order ID, Worker ID]

![Add SOW Worker form: SOW ID CNRTQ00000976 (Rev. 1), Name 20160101-20161231 General Contracting Services Canada, Period 2016-01-01 - 2016-12-31, Buyer Canadian National Railway. Setup section with Worker Owner PCO user1, Site SUPPLIER TO SELECT SITE (SITE), Location SUPPLIER TO SELECT SITE (SITE). Details section with Role dropdown (3). Cancel and Add buttons]

⚠️ Leave the fields in the Setup section as they appear.

III. Adding a New SOW Worker, cont'd

The mandatory fields will depend on whether you are adding labour or equipment.

Let's start with adding labour. The steps for adding equipment are on the next page.
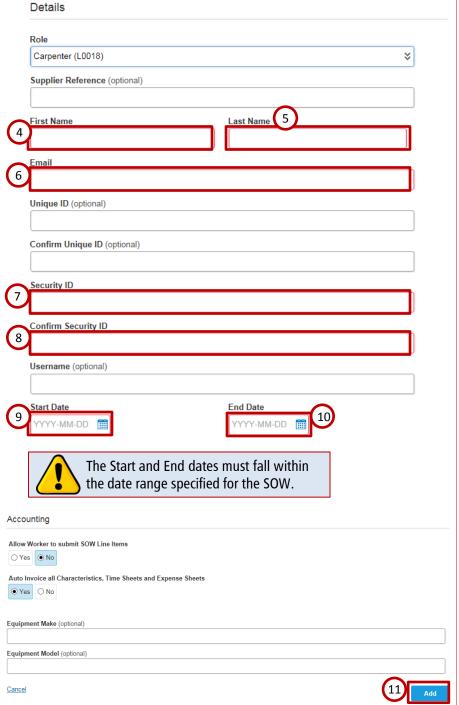
Adding Labour:

In this example, the Role that was selected was a Carpenter. When adding labour, the following information is required:

4. **First Name:** Enter the person's first name.

5. **Last Name:** Enter the person's last name.

6. **Email:** Enter your email address.

7. **Security ID:** Enter a 6-character alphanumeric code composed of the first two letters of the person's first name, first two letters of the person's last name, followed by their birth day and birth month.
   For example, Caleb Baban 17 / 07 / 1985
   CABA1707

8. **Confirm Security ID:** Re-enter the Security ID.

9. **Start Date:** Select the worker Start Date.

10. **End Date:** Select the worker End Date.

11. **Add:** Click Add to add the SOW Worker.

Continued on next page...

Details

Role
Carpenter (L0018)

Supplier Reference (optional)

First Name (4)   **Last Name** (5)

Email (6)

Unique ID (optional)

Confirm Unique ID (optional)

Security ID (7)

Confirm Security ID (8)

Username (optional)

Start Date (9)   **End Date** (10)
YYYY-MM-DD   YYYY-MM-DD

⚠️ The Start and End dates must fall within the date range specified for the SOW.

Accounting

Allow Worker to submit SOW Line Items
○ Yes ● No

Auto Invoice all Characteristics, Time Sheets and Expense Sheets
● Yes ○ No

Equipment Make (optional)

Equipment Model (optional)

Cancel   (11) **Add**
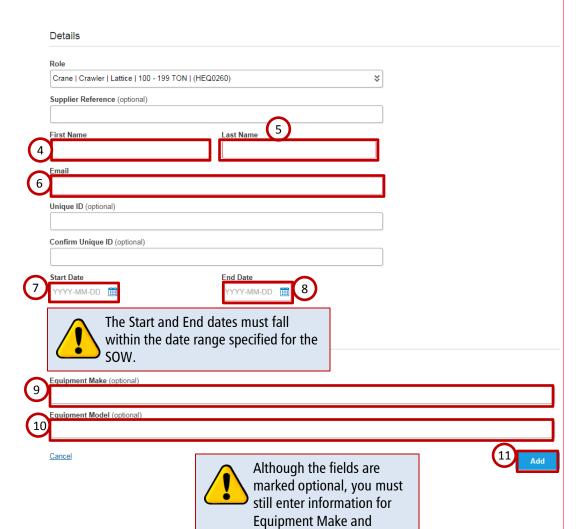
III. Adding a New SOW Worker, cont'd

Adding Equipment:

In this example, the Role that was selected was a Crane. When adding equipment, the following information is required:

4. **First Name:** Enter a name for the piece of equipment. This can be whatever you call your piece of equipment e.g., (crane).

5. **Last Name:** Enter the equipment ID (ID1234).

6. **Email:** Enter your email address.

7. **Start Date:** Select the worker Start Date.

8. **End Date:** Select the worker End Date.

9. **Equipment Make:** Enter the equipment make.

10. **Equipment Model:** Enter the equipment model.

11. **Add:** Click Add to add the SOW Worker.

Details

Role
Crane | Crawler | Lattice | 100 - 199 TON | (HEQ0260)

Supplier Reference (optional)

First Name

Last Name

Email

Unique ID (optional)

Confirm Unique ID (optional)

Start Date
YYYY-MM-DD

End Date
YYYY-MM-DD

⚠ The Start and End dates must fall within the date range specified for the SOW.

Equipment Make (optional)

Equipment Model (optional)

Cancel

⚠ Although the fields are marked optional, you must still enter information for Equipment Make and Equipment Model.
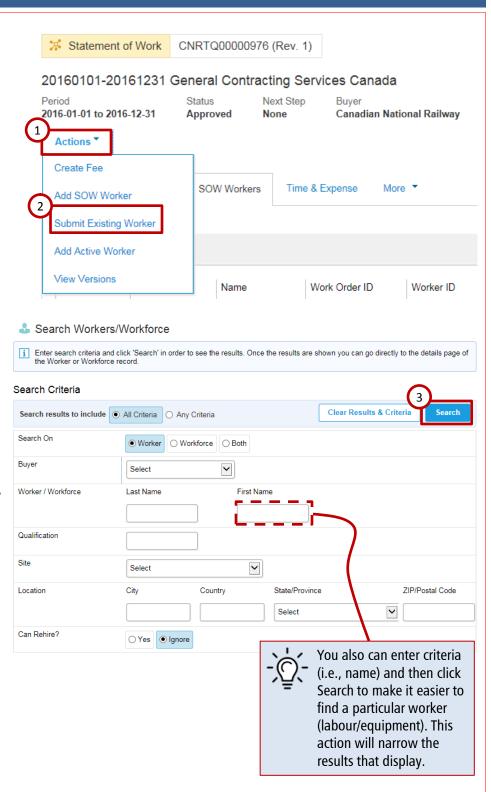
Add

IV. Submitting an Existing Worker

To avoid having to enter the worker's information, you may be able to add an existing worker (labour/equipment) that is a already in the Fieldglass system assigned to an SOW.

- The worker may have been entered in Fieldglass but has not performed work against the SOW.
- The worker could be in Fieldglass against a previous SOW.
- No fees have been submitted against this worker.

To submit an existing SOW Worker (labour or equipment):

1. **Actions:** Click the Actions button to access the dropdown list.

2. **Submit Existing Worker:** Click Submit Existing Worker to display the Search Workers/Workforce form.

3. **Search:** Click Search to display all available workers (labour and equipment).

Statement of Work   CNRTQ00000976 (Rev. 1)

20160101-20161231 General Contracting Services Canada

Period
2016-01-01 to 2016-12-31

Status
Approved

Next Step
None

Buyer
Canadian National Railway

(1) Actions ▾

- Create Fee
- Add SOW Worker
- (2) Submit Existing Worker
- Add Active Worker
- View Versions

SOW Workers   Time & Expense   More ▾

Name   Work Order ID   Worker ID

👤 Search Workers/Workforce

ℹ️ Enter search criteria and click 'Search' in order to see the results. Once the results are shown you can go directly to the details page of the Worker or Workforce record.

Search Criteria

Search results to include	● All Criteria ○ Any Criteria	Clear Results & Criteria	(3) Search

Search On	● Worker ○ Workforce ○ Both
Buyer	Select ▾
Worker / Workforce	Last Name [ ] First Name [ ]
Qualification	[ ]
Site	Select ▾
Location	City [ ] Country [ ] State/Province Select ▾ ZIP/Postal Code [ ]
Can Rehire?	○ Yes ● Ignore

💡 You also can enter criteria (i.e., name) and then click Search to make it easier to find a particular worker (labour/equipment). This action will narrow the results that display.
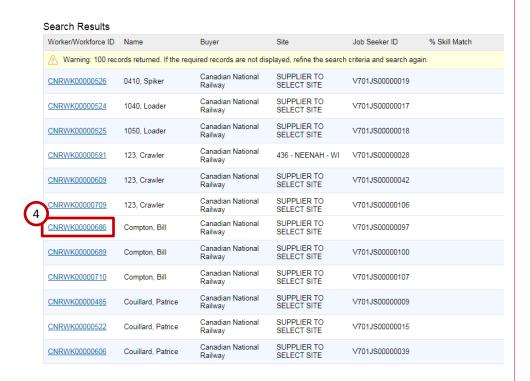
IV. Submitting an Existing Worker, cont'd

The search results will show all available workers (labour/equipment) that you can choose from.
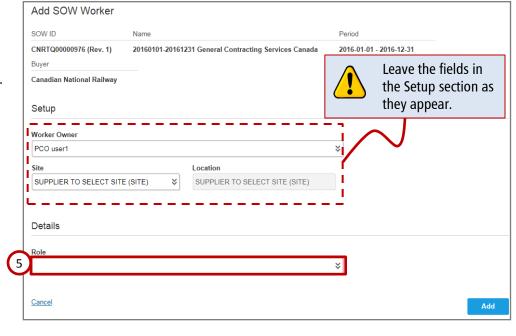
⚠️ There may be duplicate results as the same worker may be attached to more than one SOW.

In this case, although the worker (labour/equipment) information already exists, you must still assign a role to the worker. The process is the same for labour and equipment; the only difference will be the prepopulated fields on worker creation form.

4. **Worker/Workforce ID:** Click on the Worker/Workforce ID for the worker (labour/equipment) you want to add to the SOW. The worker creation form will display.

5. **Role:** From the Details section, select a Role from the dropdown list that the worker (labour or equipment) will perform for the SOW.

Search Results

Worker/Workforce ID	Name	Buyer	Site	Job Seeker ID	% Skill Match
⚠️ Warning: 100 records returned. If the required records are not displayed, refine the search criteria and search again.					
CNRWK00000526	0410, Spiker	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000019	
CNRWK00000524	1040, Loader	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000017	
CNRWK00000525	1050, Loader	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000018	
CNRWK00000591	123, Crawler	Canadian National Railway	436 - NEENAH - WI	V701JS00000028	
CNRWK00000609	123, Crawler	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000042	
CNRWK00000709	123, Crawler	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000106	
CNRWK00000686	Compton, Bill	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000097	
CNRWK00000689	Compton, Bill	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000100	
CNRWK00000710	Compton, Bill	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000107	
CNRWK00000485	Couillard, Patrice	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000009	
CNRWK00000522	Couillard, Patrice	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000015	
CNRWK00000606	Couillard, Patrice	Canadian National Railway	SUPPLIER TO SELECT SITE	V701JS00000039	

4

Add SOW Worker

SOW ID	Name	Period
CNRTQ00000976 (Rev. 1)	20160101-20161231 General Contracting Services Canada	2016-01-01 - 2016-12-31

Buyer
Canadian National Railway

Setup

⚠️ Leave the fields in the Setup section as they appear.

Worker Owner
PCO user1

Site
SUPPLIER TO SELECT SITE (SITE)

Location
SUPPLIER TO SELECT SITE (SITE)

Details

Role

5

Cancel   Add

IV. Submitting an Existing Worker, cont'd

Let's first look at what the form would look like for adding labour.

The steps for adding equipment are on the next page.

Adding Existing Labour

After selecting a role for the person, the form will expand. Enter the following information:

6. **Start Date:** Select the worker Start Date.

7. **End Date:** Select the worker End Date.
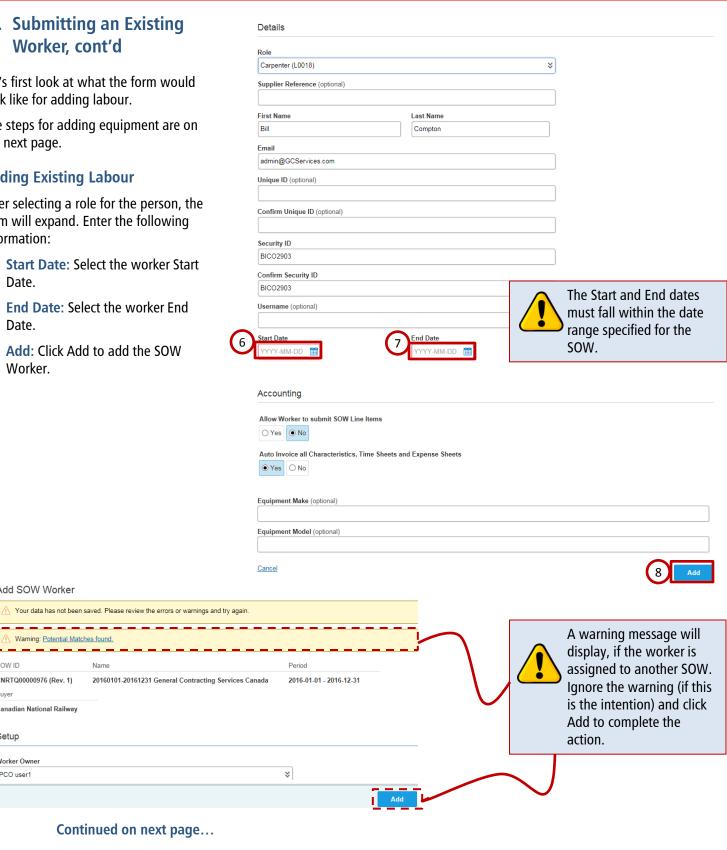
8. **Add:** Click Add to add the SOW Worker.

Details

Role
Carpenter (L0018)

Supplier Reference (optional)

First Name
Bill

Last Name
Compton

Email
admin@GCServices.com

Unique ID (optional)

Confirm Unique ID (optional)

Security ID
BICO2903

Confirm Security ID
BICO2903

Username (optional)

(6) **Start Date**
YYYY-MM-DD

(7) **End Date**
YYYY-MM-DD

> ⚠ The Start and End dates must fall within the date range specified for the SOW.

Accounting

Allow Worker to submit SOW Line Items
○ Yes ● No

Auto Invoice all Characteristics, Time Sheets and Expense Sheets
● Yes ○ No

Equipment Make (optional)

Equipment Model (optional)

Cancel

(8) **Add**

Add SOW Worker

⚠ Your data has not been saved. Please review the errors or warnings and try again.

⚠ Warning: Potential Matches found.

SOW ID	Name	Period
CNRTQ00000976 (Rev. 1)	20160101-20161231 General Contracting Services Canada	2016-01-01 - 2016-12-31

Buyer
Canadian National Railway

Setup

Worker Owner
PCO user1

Add

> ⚠ A warning message will display, if the worker is assigned to another SOW. Ignore the warning (if this is the intention) and click Add to complete the action.
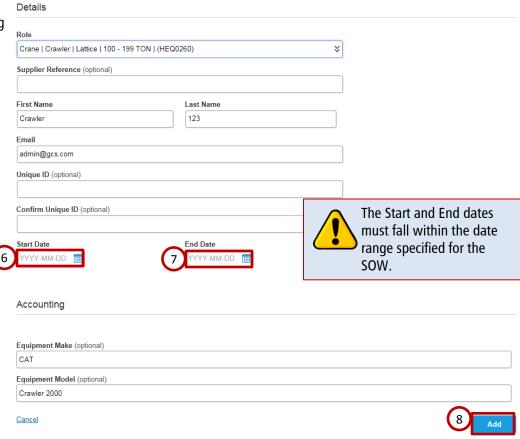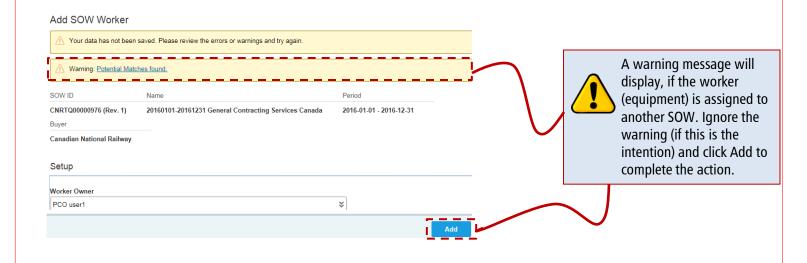
Continued on next page…

IV. Submitting an Existing Worker, cont'd

Adding Existing Equipment

After selecting a role for the equipment, the form will expand. Enter the following information:

6. **Start Date:** Select the worker Start Date.

7. **End Date:** Select the worker End Date.
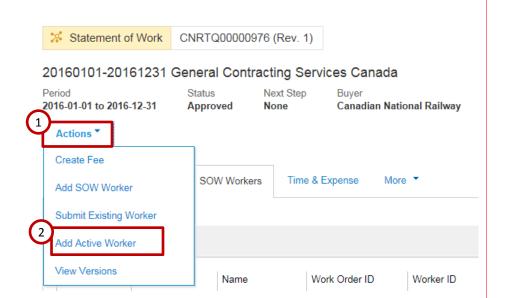
8. **Add:** Click Add to add the SOW Worker.

Details

Role
Crane | Crawler | Lattice | 100 - 199 TON | (HEQ0260) ⌄

Supplier Reference (optional)

First Name   Last Name
Crawler   123

Email
admin@gcs.com

Unique ID (optional)

Confirm Unique ID (optional)

⑥ Start Date   ⑦ End Date
YYYY-MM-DD 📅   YYYY-MM-DD 📅

> ⚠️ The Start and End dates must fall within the date range specified for the SOW.

Accounting

Equipment Make (optional)
CAT

Equipment Model (optional)
Crawler 2000

Cancel   ⑧ **Add**

Add SOW Worker

⚠️ Your data has not been saved. Please review the errors or warnings and try again.

⚠️ Warning: Potential Matches found.

SOW ID	Name	Period
CNRTQ00000976 (Rev. 1)	20160101-20161231 General Contracting Services Canada	2016-01-01 - 2016-12-31

Buyer
Canadian National Railway

Setup

Worker Owner
PCO user1 ⌄

Add

> ⚠️ A warning message will display, if the worker (equipment) is assigned to another SOW. Ignore the warning (if this is the intention) and click Add to complete the action.
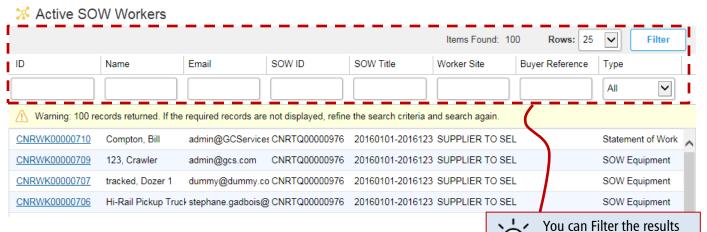
V. Adding an Active Worker

You may need to add workers (labour/equipment) to an SOW that are already active on another SOW and for which fees have already been submitted.

To add an Active Worker (labour or equipment) to an SOW:

1. **Actions:** Click the Actions button to access the dropdown list.

2. **Add Active Worker:** Click Add Active Worker to display the Active SOW Workers page.

Statement of Work   CNRTQ00000976 (Rev. 1)

20160101-20161231 General Contracting Services Canada

Period	Status	Next Step	Buyer
2016-01-01 to 2016-12-31	Approved	None	Canadian National Railway

① **Actions** ▾

Create Fee

Add SOW Worker   SOW Workers   Time & Expense   More ▾

Submit Existing Worker

② Add Active Worker

View Versions   Name   Work Order ID   Worker ID

✖ Active SOW Workers

Items Found: 100   Rows: 25 ▾   **Filter**

ID	Name	Email	SOW ID	SOW Title	Worker Site	Buyer Reference	Type
							All ▾

⚠ Warning: 100 records returned. If the required records are not displayed, refine the search criteria and search again.

ID	Name	Email	SOW ID	SOW Title	Worker Site		Type
CNRWK00000710	Compton, Bill	admin@GCServices	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		Statement of Work
CNRWK00000709	123, Crawler	admin@gcs.com	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		SOW Equipment
CNRWK00000707	tracked, Dozer 1	dummy@dummy.co	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		SOW Equipment
CNRWK00000706	Hi-Rail Pickup Truck	stephane.gadbois@	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		SOW Equipment

💡 You can Filter the results to make it easier to find a particular worker (labour/equipment). You can select the number of rows that display and/or you can filter by ID, name, email, SOW ID, etc.

Continued on next page…
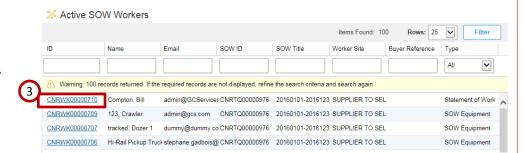
V. Adding an Active Worker, cont'd

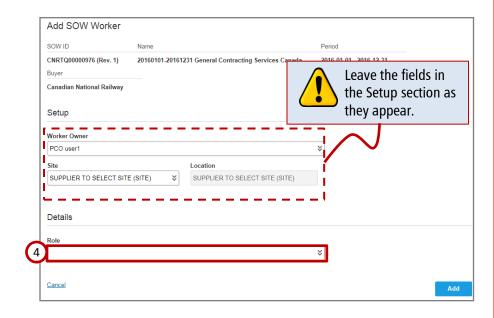The SOW Workers page will show active workers (labour/equipment) that you can choose from.

⚠️ There may be duplicate results as the same worker may be attached to more than one SOW.

Even though the worker (labour/equipment) information exists, you must still assign a role to the worker. The process is the same for labour and equipment; the only difference will be the prepopulated fields on the worker creation form.
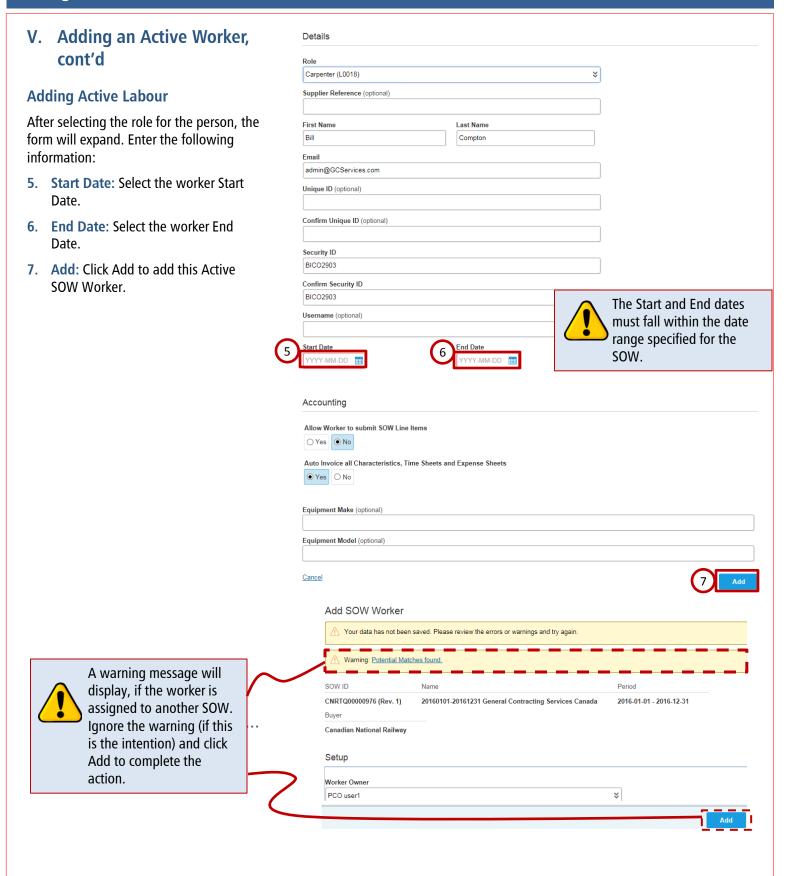
3. Worker ID: Click the Worker ID for the worker (labour/equipment) you want to add to the SOW. The worker creation form will display.

4. Role: From the Details section, select a Role from the dropdown list that the worker (labour or equipment) will perform for the SOW.
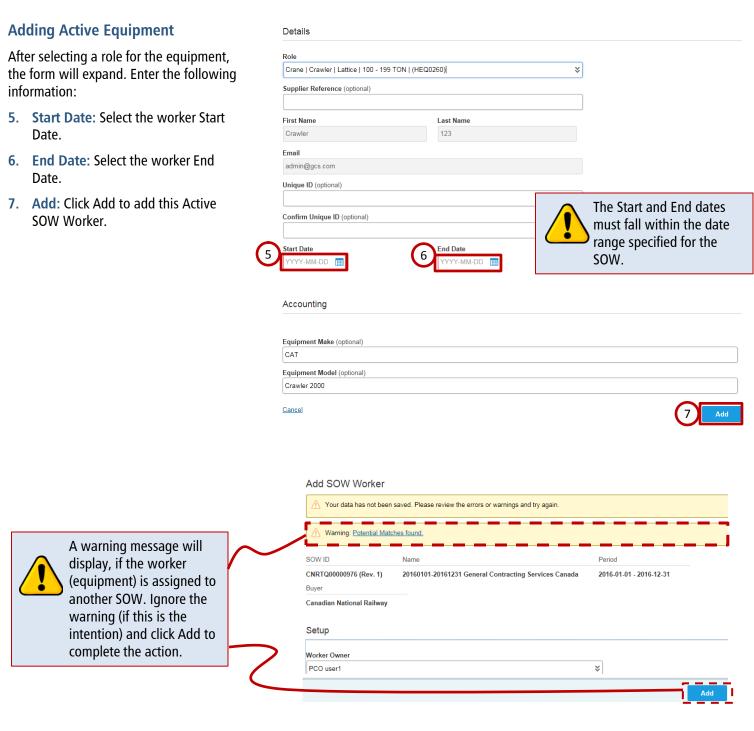
Active SOW Workers

Items Found: 100 Rows: 25 Filter

ID	Name	Email	SOW ID	SOW Title	Worker Site	Buyer Reference	Type
							All
⚠️ Warning: 100 records returned. If the required records are not displayed, refine the search criteria and search again.							
CNRWK00000710	Compton, Bill	admin@GCServices	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		Statement of Work
CNRWK00000709	123, Crawler	admin@gcs.com	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		SOW Equipment
CNRWK00000707	tracked, Dozer 1	dummy@dummy.co	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		SOW Equipment
CNRWK00000706	Hi-Rail Pickup Truck	stephane.gadbois@	CNRTQ00000976	20160101-2016123	SUPPLIER TO SEL		SOW Equipment

Add SOW Worker

SOW ID	Name	Period
CNRTQ00000976 (Rev. 1)	20160101-20161231 General Contracting Services Canada	2016-01-01 - 2016-12-31

Buyer

Canadian National Railway

Setup

⚠️ Leave the fields in the Setup section as they appear.

Worker Owner
PCO user1

Site
SUPPLIER TO SELECT SITE (SITE)

Location
SUPPLIER TO SELECT SITE (SITE)

Details

Role

Cancel   Add

V. Adding an Active Worker, cont'd

Adding Active Labour

After selecting the role for the person, the form will expand. Enter the following information:

5. **Start Date:** Select the worker Start Date.

6. **End Date:** Select the worker End Date.

7. **Add:** Click Add to add this Active SOW Worker.

Details

Role
Carpenter (L0018)

Supplier Reference (optional)

First Name
Bill

Last Name
Compton

Email
admin@GCServices.com

Unique ID (optional)

Confirm Unique ID (optional)

Security ID
BICO2903

Confirm Security ID
BICO2903

Username (optional)

⑤ **Start Date**
YYYY-MM-DD

⑥ **End Date**
YYYY-MM-DD

⚠ The Start and End dates must fall within the date range specified for the SOW.

Accounting

Allow Worker to submit SOW Line Items
○ Yes ◉ No

Auto Invoice all Characteristics, Time Sheets and Expense Sheets
◉ Yes ○ No

Equipment Make (optional)

Equipment Model (optional)

Cancel   ⑦ **Add**

Add SOW Worker

⚠ Your data has not been saved. Please review the errors or warnings and try again.

⚠ Warning: Potential Matches found.

SOW ID	Name	Period
CNRTQ00000976 (Rev. 1)	20160101-20161231 General Contracting Services Canada	2016-01-01 - 2016-12-31

Buyer
Canadian National Railway

⚠ A warning message will display, if the worker is assigned to another SOW. Ignore the warning (if this is the intention) and click Add to complete the action.

Setup

Worker Owner
PCO user1

Add

V. Adding an Active Worker, cont'd

Adding Active Equipment

After selecting a role for the equipment, the form will expand. Enter the following information:

5. **Start Date:** Select the worker Start Date.

6. **End Date:** Select the worker End Date.

7. **Add:** Click Add to add this Active SOW Worker.

Details

Role
Crane | Crawler | Lattice | 100 - 199 TON | (HEQ0260)|

Supplier Reference (optional)

First Name
Crawler

Last Name
123

Email
admin@gcs.com

Unique ID (optional)

Confirm Unique ID (optional)

(5) Start Date
YYYY-MM-DD

(6) End Date
YYYY-MM-DD

> ⚠ The Start and End dates must fall within the date range specified for the SOW.

Accounting

Equipment Make (optional)
CAT

Equipment Model (optional)
Crawler 2000

Cancel   (7) **Add**

> ⚠ A warning message will display, if the worker (equipment) is assigned to another SOW. Ignore the warning (if this is the intention) and click Add to complete the action.

Add SOW Worker

⚠ Your data has not been saved. Please review the errors or warnings and try again.

⚠ Warning: Potential Matches found.

SOW ID	Name	Period
CNRTQ00000976 (Rev. 1)	20160101-20161231 General Contracting Services Canada	2016-01-01 - 2016-12-31

Buyer
Canadian National Railway

Setup

Worker Owner
PCO user1

Add

VI. Uploading SOW Workers

You can also add workers by uploading an SOW Team Member Excel File to Fieldglass. This method allows you to add several workers (labour/equipment) in one upload.

To add Workers from an SOW Team Member Excel file:

1. **Admin Menu:** Click on the admin icon above the menu bar to access the Admin screen.

2. **Upload Data:** Click on Upload Data.

> ≫ The Upload Data form will display.
>
> Download the SOW Team Member Excel template to add worker details and then upload the completed form to Fieldglass.

Download:

To get the SOW Team Member Excel template, from the Download File Format section:

3. **Upload SOW Team Member:** Select the radio button to download the file format (below the download button).

4. **Download:** Click the download button. You will be prompted to Open or Save the file to your computer).

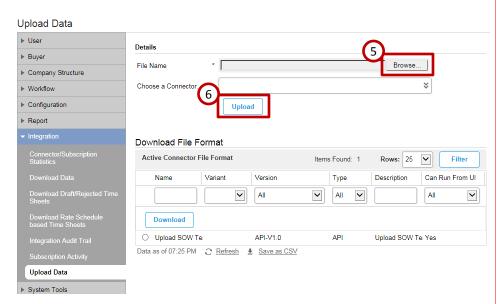## VI. Uploading SOW Workers, cont'd

The following fields in the Excel file are mandatory. An example of the information required for labour and equipment is provided in the table below.

Mandatory Fields	Labour	Equipment
▪ Buyer Code	CNR	CNR
▪ Statement of Work ID	CNRTQ00000976	CNRTQ00000976
▪ First Name	John	John Deere 4500
▪ Last Name	Barrell	ID5678
▪ Email	JohnBarrel@ABC123.com	dummy@dummyabc123.com
▪ Team Member Role (the Role Name must match exactly what is specified in the SOW)	Foreman	Excavator | Tracked | | 50000 - 59999 LB |
▪ Site Code (always "SITE")	SITE	SITE
▪ Start Date	MM/DD/YYYY	MM/DD/YYYY
▪ End Date	MM/DD/YYYY	MM/DD/YYYY
▪ Security ID (for labour only; first 2 letters of first name, first 2 letters of last name, month MM of birth, day DD of birth)	JOBA0304	
▪ Equipment Make (for equipment only)		John Deere
▪ Equipment Model (for equipment only)		4500

Upload:

To upload the SOW Team Member Excel file to Fieldglass:

5. **Browse:** Click Browse to locate the file on your computer.

6. **Upload:** Click Upload. The workers (workers/equipment) listed in the excel spreadsheet will load to the system.
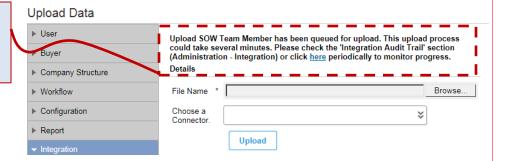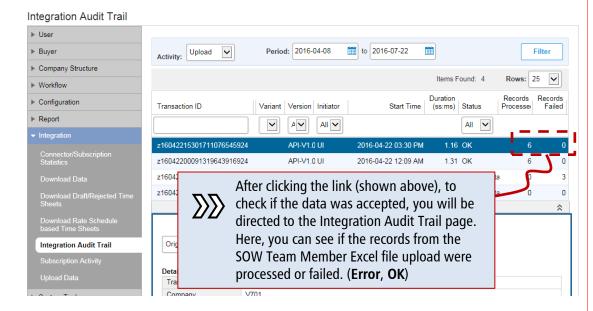
VI. Uploading SOW Workers, cont'd

A message will display at the top of the screen stating the file is queued for upload. You can click on the link to check if the data was accepted.

Upload Data

▶ User
▶ Buyer
▶ Company Structure
▶ Workflow
▶ Configuration
▶ Report
▼ Integration

Upload SOW Team Member has been queued for upload. This upload process could take several minutes. Please check the 'Integration Audit Trail' section (Administration - Integration) or click here periodically to monitor progress.
Details

File Name * [   ] Browse...

Choose a Connector. [⌄]

Upload

If the upload has failed, review error message. Make the necessary modifications and re upload.

Integration Audit Trail

▶ User
▶ Buyer
▶ Company Structure
▶ Workflow
▶ Configuration
▶ Report
▼ Integration
  Connector/Subscription Statistics
  Download Data
  Download Draft/Rejected Time Sheets
  Download Rate Schedule based Time Sheets
  Integration Audit Trail
  Subscription Activity
  Upload Data

Activity: Upload ⌄   Period: 2016-04-08 to 2016-07-22   Filter

Items Found: 4   Rows: 25 ⌄

Transaction ID	Variant	Version	Initiator	Start Time	Duration (ss:ms)	Status	Records Processed	Records Failed
[ ]	⌄	A ⌄	All ⌄			All ⌄		
z16042215301711076545924		API-V1.0 UI		2016-04-22 03:30 PM	1.16	OK	6	0
z16042200091319643916924		API-V1.0 UI		2016-04-22 12:09 AM	1.31	OK	6	0
z16042...						...a	0	3
z16042...						...a	0	0

After clicking the link (shown above), to check if the data was accepted, you will be directed to the Integration Audit Trail page. Here, you can see if the records from the SOW Team Member Excel file upload were processed or failed. (**Error**, **OK**)

Orig...

Deta...
Tra...
Company   V701

Adding Workers to an SOW

VII. Verifying SOW Workers Were Added

If the upload was successful, you can verify if Workers were added to the SOW.

To verify if the workers were added, from the Home Page, complete the following steps:

1. **SOWs:** Click the SOWs button on the Home Page.

2. **SOW ID:** Click the ID link of the SOW to view the details.

3. **SOW Workers tab:** Click the SOW Workers tab. The workers (labour/equipment) that were successfully added will display in this view.